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ABSTRACT

This publication is designed for counselors, teachers and parents who want to improve their local guidance program and make it more responsive to the needs of those it serves. Broad and intensive school-community involvement, including parents, pupils, school personnel, school board members, and concerned citizens, is a primary feature. Step-by-step planning procedures are listed, based on the school's purpose and educational goals. Chapter One offers an overview for the casual reader. Chapter Two outlines the range of commitment and depth of involvement necessary for implementation of the process. Chapter Three contains specific procedures as well as samples and simulations of activities and materials to be used in school settings. (Author/BP)

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CAREER GUIDANCE

# NEEDS ASSESSMENT A STEP IN PROGRAM PLANNING

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## PREFACE

This publication describes an effort by the Bureau of Guidance to aid schools to put into practice elements of systematic career guidance planning. It treats the topic of needs assessment as a component of program planning from a general to a specific practice level. Chapter I offers an overview for the casual reader. Chapter II outlines the range of commitment and depth of involvement necessary for implementation of the process for those who want to attempt it. Chapter III contains specific how-to-do-it procedures and samples and simulations of activities and materials to be used in school settings.

The Bureau of Guidance is available to help individual school districts and groups of school districts implement this approach.

The basic publication was prepared by Kenneth E. York, Associate in Education Guidance, and John P. Stebbins, Supervisor in Education Guidance, Bureau of Guidance, New York State Education Department. They were assisted by E. Victor Boyd, John P. Harrison, Sterling L. Pierce, and J. Paul Tonetti, all of whom are Associates in Education Guidance.

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# CHAPTER I

## A Guidance Program Planning Model

**PURPOSE**

This publication is for counselors, teachers, and parents who want to improve their local guidance program and to make it more responsive to the needs of those it serves. It describes a planning process or system that uses educational and career requirements of the future rather than activities of the past. Broad and intensive school-community involvement, to include parents, pupils, school personnel, school board members, and concerned citizens, is a primary feature. What these people offer about the guidance program is the foundation for the development of the plan.

**PLANNING ELEMENTS**

Essential procedures for guidance planning are:

- List the school's purpose and goals for education
- Compile an inventory of pupil needs by involving school and community
- Catalog and prioritize the school's current programs and identify the needs they meet
- Design program goals to meet pupil needs in conjunction with the school's goals and programs
- Fashion objectives to meet the goals
- Develop a calendar of activities
- Build an evaluation plan to measure the extent to which the program meets its objectives and obtain feedback about the program's effect
- Recycle what is effective, change what is not

**FOCUS**

The following pages focus on two points of the above, the compilation and interpretation of pupil needs (a needs assessment), and the involvement of school and community personnel as a resource base (an advisory committee). These points are parts of a broad career guidance planing method. For ease of understanding in this publication, they are dealt with as separate units.

**PRELIMINARY ASSESSMENT QUESTIONS**

As people become involved in the planing process (teachers, pupils, parents, community leaders), they seek answers to a variety of questions that include:

- What are pupils' needs --
  - To learn how to learn?
  - To learn to earn?
  - To learn to understand and get along with others?
- What general educational goals need to be met --
  - To make life rewarding and satisfying?
  - To prepare for jobs?
  - To discover and nurture creative talent?
- What specific objectives need to be met --
  - To acquire knowledge?
  - To learn skills?
  - To develop positive attitudes toward life?
  - To perform effectively?
- What practices and services need to be provided by the school?
- What guidance teaching-learning activities are needed --
  - A guidance curriculum?
  - Guidance counseling services?
  - Related support services for the entire community?
- What guidance policies and activities need to be developed?
- What guidance management practices need to be created to carry out a program?
- What is available to help the guidance program?
- What school and community cooperation is needed?
- What staff will be involved?
- What facilities will be required?
- What funding will be necessary?

After the above questions are asked and answered, additional questions are raised:

- Were all people who should be contacted or sampled in the identification of pupil needs?
- Do all goal statements relate directly to one or more of the needs?
- Has each statement been expressed in terms that describe an activity or procedure so that its effect on pupils can be measured?
- Have all sources of help been identified and to what extent?
- What changes will improve the plan?

**CHECKPOINTS**

To assure that answers are collected in a useful way, checkpoints are built into the procedure. They may be a simple meeting of those involved in the plan to discuss progress, or they may involve a formal evaluation/review procedure. They occur after the identification and prioritization of pupil needs, the goal and objective development phase, the program planning phase, and at appropriate times in the implementation phase.

**SYSTEMATIC PROGRAM PLANNING**

Systematic planning helps to develop guidance programs and services through effective organization and quick response to pupil needs. It assists schools to individualize instruction and bases further development on identified needs of pupils. Planning provides a way to accomplish comprehensive long-range goals for guidance. It establishes staff responsibilities and procedures, makes use of resources, and interrelates:

- School and community
- Programs, practices, services, and activities
- Information, procedures, and results
- Costs and benefits

Program planning has potential disadvantages as well as advantages. It is possible to lose sight of the individual aspects of human relationships while in pursuit of objective measures of the program. Formal objectives are means of communication between members of a staff and their manager about what both think is

worthwhile and reasonable to accomplish. It is also possible to use such an approach as a unilateral system to control staff. Program planning procedures indicate to the community what the school can accomplish. They also increase community interest, both negative and positive. Finally, while program planning identifies and communicates approaches which work, it can communicate lack of success just as clearly. Planning procedures work best when there is trust that the school does its best and uses perceptions of inadequacy as information for modification of program. It must be emphasized that needs assessment and program planning may actually be counterproductive unless there is a firm commitment to use the results constructively.

**SUMMARY**

In planning, each step provides a solid base for the next step. The first steps, needs assessment and goal development, provide a map of where a district wants to go and lead to an analysis of the problems related to the needs. The analysis provides knowledge of facts and causal relationships necessary to find solutions. The generation of alternative solutions and the selection of those appropriate for the situation follow. Evaluation takes place throughout the process, not only at the conclusion.

A framework for discussion and consideration of the process follows.

## Action Steps

| Actions | Product | By Whom? |
|---|---|---|
| 1. Commitment | A "Resolution of Intent" | School Board |
| 2. Initial plan | Involvement | School staff, parents, pupils, assistance by SED |
| 3. - Where are we?<br>- Where do we want to go?<br>- How do we get there?<br>- How will we know? | Identification of needs<br>Selection of goals/ objectives<br>Development of program<br>Design of evaluation | School staff, parents, pupils, assistance by SED and others |
| 4. Acceptance of Plan | ----- | School Board |
| 5. Implementation & Evaluation | Management by plan<br>Documentation of progress in meeting objectives<br>Review & Approval | School staff, parents, pupils assisted by SED and others, School Board (approval by Bureau of Guidance may be desired) |

# CHAPTER II

## ESTABLISHMENT OF A GUIDANCE PLANNING PROCESS

This chapter outlines a "how-to-do-it" procedure. Some districts may already have parts of the procedure in operation and will only want to add and reorganize activities. Others may adopt the entire procedure. The first part of the chapter discusses the total process; the second, specifics involved in a needs assessment.

**GENERAL STEPS**

Guidance planning develops programs based on local philosophy, needs, and resources. These steps outline the process.

### Commitment

To begin, approval is obtained from the board of education. They must realize that when they accept the process they also commit themselves to change.

### Initial Planning

An initial session charts the activities needed to develop a district-wide plan. People in different roles decide how to implement these activities. An advisory committee is given responsibility to assist.

### Assessing Current Status

Next, the status and plans of the current program are determined. The hopes and desires of a community for its children and youth, for whom guidance services are ultimately intended, are as varied as the people involved. Pupil goals do not always coincide with parent goals. Parent goals are not always the same as those of teachers. Fact finding sessions and opinion surveys determine the current understanding of the program and give an idea of the direction toward which people would like it to move.

Goals Analysis

Information gained from fact finding is analyzed to determine its significance. Additional information about school policies and practices, instruction, and general program management may be needed since guidance is closely related to administrative and instructional programs. When programs are related to future goals, they may reveal the need to revise or extend current services, to add new services, to drop present services, or to combine current programs for greater effectiveness.

Program Development

New plans are required when the school and community decide to update the program. Goals, proposed tentatively at first, are checked against surveys of pupil and community needs ard further checked against school practices, programs, and resources. Goal statements are divided into several basic objectives. These objectives are further divided into subobjectives which contribute to their achievement and measurement. Subobjectives specify what must be accomplished to enable pupils to reach goals. Pupil objectives are called behavioral objectives. Staff objectives are called operational objectives.

Completion

After goals and objectives are developed and priorities established, worksheets are used to define activities, specific procedures, resource personnel, timetables and budget for all areas of guidance. Information secured earlier allows standards to be established. Followup in the evaluation phase indicates the need for further modification of practices to achieve desired results.

DEFINITION OF NEEDS ASSESSMENT

"Needs assessment" is a part of a larger process and not an activity independent and complete in itself. "Need" is the discrepancy between a pupil's current status and a desired status. This does not imply an ill to be remedied, but rather an indication of direction in which a pupil should move. "Needs assessment" is the process that identifies the perceived or expressed "needs" of pupils (as viewed by school, parents, and pupil). It uses various measurements and activities to collect data to define the gap between "what is" and "what is wanted."

Energies and efforts to meet needs of pupils cause programs to function and staff to have a positive impact on pupils. Periodic assessments determine these impacts. Often what is accomplished is measured on the basis of guesswork or long established practice. Conducting program activities solely on this basis is inappropriate. Information from an objective assessment provides direction to plan activities and assists to establish program priorities. Without this, priorities are often sources of dissension and conflict.

Needs assessment, when viewed in the narrow sense, is an information-gathering process to obtain facts needed for decision-making. As such, it is a discrete, short-term activity performed by a limited number of people. In a broader sense, it is a continual feedback process to:

- Gather planning data
- Involve teachers and community in an activity with immediate payoff
- Improve communication about guidance objectives to staff and community
- Inform parents about guidance

## PURPOSE OF NEEDS ASSESSMENT

Needs assessment, as developed in this publication, is a process that identifies perceived or expressed needs of pupils. It uses measurements and activities to obtain data to define the gap between "what is" and "what is wanted." The process involves the selection, design, and administration of surveys to sample a cross section of the community and school population. It should be remembered that this is but one approach. Needs can also be suggested by "experts," taken from the literature, or defined by legislative bodies. Since these are external, they may need to be tested for local relevance.

The purposes of a needs assessment are to:

- Obtain information to provide direction to plan program activities and list priorities
- Collect baseline data to develop program evaluation procedures
- Provide citizen involvement
- Improve lines of communication to staff and community
- Provide a basis to allocate resources to meet needs

A needs assessment depends upon the:

- Approval of administration and board of education
- Initial planning by interested persons
- Selection of a committee
- Discussion and definition of the reasons for doing a needs assessment
- Determination and allocation of budget, time, and staff

The committee represents staff, pupils, administration, parents, and community. Examples are a:

- Board member
- Community member
- Representative from administration
- Representative from instruction
- Pupil
- Parent
- Counselor

The committee plans and manages the needs assessment and identifies and lists the needs that exist in the district (based on data gathered). It then prepares a report for administration, board of education, and community.

## BASIC ASSUMPTIONS

If the development of proactive guidance programs are a major concern of counselors, then it must be assumed that:

- School guidance programs exist
- School guidance programs have a crucial role to determine outcomes of education as it affects individual pupils
- School guidance programs monitor the educational, career, and social/personal decisions and plans of pupils
- School districts employ persons who possess skills to carry out a planning process

## INITIAL STEPS IN NEEDS ASSESSMENT

The planning procedure is complicated in implementation but easily described. Initially, it requires pupils, parents, teachers, and administrators to become involved in discussions about the current guidance program. These discussions are summarized and opinions and areas of agreement that concern program adequacies and needs are identified. Next, representatives from the groups are selected for an advisory committee. This committee assists the staff to publicize present services and concerns and proposed changes or extensions in the program. This opens the program to scrutiny and identifies persons who will assist in program development. The assessment itself begins with four questions:

- What do we want to know?
- Why do we want to know it?
- Who knows it or has the information?
- How can the information be most economically, efficiently, and accurately collected?

## DATA GATHERING

Needs assessment is a process to gather information which is obtained through surveys that record opinions and knowledge about particular situations. There are four forms of survey: personal, small group, telephone, and mail. All use a form to record data in a consistent manner.

Surveys encourage broad community participation in planning. They give employers a chance to "talk" to school officials with anonymity. They permit parents to make preferences known in a way that can be used constructively by school staff. They allow pupils opportunity to express concerns about their education. They help school personnel to learn how different groups look at particular issues to determine opinions and misconceptions about areas of need and the school's relationship to them. Information from surveys is used with data from other sources. Pupil records, information from followup studies, and guidance annual reports provide information to supplement and amplify survey data.

Surveys identify changes that occur over time. As issues and concerns recede and emerge, new questions arise. This requires survey work to continue on a periodic basis. It is wise to use an independent survey organization for sensitive issues or for situations that result in public action if the district's own survey might be viewed as slanted.

Upon completion of data collection, responses are edited for internal consistency, converted to code classifications, and data placed on punch cards. Survey data are then processed, analyzed, and interpreted. Results may be compared to previous surveys, surveys on other aspects of education, and similar surveys in other districts. Responses usually are separated -- male compared to female, younger to older, newcomers to longer residents, pupils to teachers, and teachers to parents. Replies are noted in relation to the extent that respondents have actually had direct contact or made use of guidance services. Results are made available to all participants. When the surveys are conducted capably and data used as unbiased estimates of consumer opinion, the final report will work for increased community support.

Close communication with decision makers is essential since a needs assessment operation affects decisions at all levels (policy, program, and operation). A decision maker is a person who has authority to determine a course of action. Decision makers, their level of position, responsibilities, and influence within the school and community must be identified. Policy decisions which set limits to develop programs made by the school board. Program decisions which implement policy in a given time period are made by the school superintendent and administrative staff. Operational decisions which activate the objectives of program decisions are made by building principals, guidance directors, counselors, teachers, and clerical staff.

**OBSERVATIONS AND COMMENTS**

In group interviews, the interviewer meets with two or more persons at a time. If properly planned, these can reduce travel and interview time. It is possible to structure groups so that a shy participant is teamed with a friend who is more verbal and willing to express opinions. To share ideas in a group will often increase production because as people listen

to others their own ideas expand. One problem as groups increase in size is that the dynamics become increasingly difficult for a leader to manage.

Questionnaires and opinionnaires can be circulated in the district newsletter or in a local newspaper as well as by direct mail. They have the advantage of being able to deal with a wide variety of questions. If questions are well constructed, clearly worded, call for yes/no or multiple choice answers that are easy to check, even people with limited education can respond. Not everyone returns mail questionnaires, however, which results in a limited response rate. A low response rate requires data to be treated with skepticism in terms of representativeness. Persons with extreme views are more apt to answer than those with moderate views and older or less educated persons make fewer responses. When questionnaires are included in other mailings, as with district newsletters, replies may be emotionally colored by other items in the envelope. If this procedure is used, a sample of at least 50 personal interviews should be taken to validate the questionnaire results.

A telephone survey is economical since it eliminates the need for travel. People feel free to talk and are as candid as they would be in personal interviews. The process of followup on incomplete interviews is simple, which makes high returns possible. There can be an immediate summary of returns. There are, however, several drawbacks Families without telephones or with unlisted numbers are excluded. The explanation of the purpose for the survey may cause difficulty for the interviewer. It is difficult to sustain the attention of the respondee. Interviewers must be carefully selected and provided with proper preservice training.

While people welcome opportunities to voice concerns if assured that action will follow, future efforts may be met with apathy and noncooperation if action is not forthcoming.

In the survey form, words may have different meanings. Questions must be worded so that persons of different age or background understand the common meanings. A pretest is vital. If results are to be compared between surveys, the same words must be retained. Free response items that encourage people to reply in their own words take time to complete and to analyze. However, they allow people to express themselves fully and avoid any bias which may have influenced those who prepared specific questions.

The order of questions has an effect. Early questions set a frame of reference for later ones and provide clues to what the study designers want to hear. Some people tailor answers to fit the situation they perceive.

Interviewers introduce errors if questions are not asked as written, if answers are misunderstood, or misrecorded. Voice tone or facial expressions influence responses. People tend to withhold sensitive information and dress up opinions to sound socially desirable.

Confidentiality can be an issue. Surveys may raise questions which some are reluctant to answer. To counter this, promise and adhere to confidentiality. Remove names from interview schedules and questionnaires after they have been checked and use code numbers rather than names on punch cards. A clear explanation of why the survey is being done and how the data will be used is needed.

The time required to conduct a needs assessment is dependent upon how extensive a population is to be surveyed. The larger the population, the more interviewers will be required. Remember that the total time includes actual interview hours and time spent to prepare and present questions, to travel, to rewrite notes, and to summarize data. Thirty to forty minutes is considered maximum for individual interviews. Small group interviews take longer. Those who wish to have total district input can place questionnaires in a district newsletter or local newspaper. To keep the project within reasonable bounds, some form of sampling is recommended. *Simple random sampling* draws names at random from the whole population. *Stratified random sampling* draws samples separately from various subgroups whose members have an equal chance for selection. *Cluster sampling* allows people who live near each other to be selected. Once a sample reaches a certain size, increasing it has only modest impact on its accuracy.

Productivity of interviews varies with the ability, experience, and motivation of the interviewer. Inservice training assures that comparable explanations can be given about the purpose of the survey. Volunteer interviewers can be obtained from the community and pupils may become involved as part of a school project.

Districts with limited experience in surveys will incur initial costs. Experience is needed to avoid pitfalls. When local staff gain experience, these costs do not recur. As periodic surveys are undertaken, their operation becomes part of the regular procedures and program costs of the district.

# CHAPTER III

## A Model for Needs Assessment

After a decision to begin a new process has been made, it is often difficult to determine where to start implementation. The sample agenda below offers one such way. It outlines a day workshop designed to develop skills for a needs assessment process with an advisory council. There are sample materials which can be used with or without adaptation in local programs. To aid in the selection of appropriate materials, an abstract of each appendix is included. Sources for additional sample materials are listed in Appendix XV and Appendix XVI. It should be emphasized that the sample and simulation materials reproduced require adaptation to local school situations.

MODEL CAREER GUIDANCE
NEEDS ASSESSMENT WORKSHOP

Agenda

| | |
|---|---|
| Before 9:00 AM | Registration and coffee |
| 9:00 - 9:45 | Give overview of planning process and description of needs assessment. Target on pupil needs as a basis to test goals, establish priorities, and revise program activities. (See Appendix I.) |
| 9:45 - 10:45 | List, on newsprint, most successful aspects of present guidance operations. List related problems. (See Appendix II and Appendix VIII.) |
| 10:45 - 11:00 | Break |
| 11:00 - 12:00 | Develop questions to include lists which administrators, teachers, pupils, parents, employers, and other pupil personnel have about guidance. (See Appendix III.) |
| 12:00 - 1:00 | Lunch |

| | |
|---|---|
| 1:00 - 2:30 | Conduct skill sessions to select and group items, to establish questionnaire format and length, and to develop system to code items. (See Appendix IV.) |
| 2:30 - 3:15 | Give overview of report process. Include establishment of objectives with baselines, summarization of data, report procedures, and use of information. (See Appendix V.) |
| 3:15 - 3:45 | Critique reports. (See Appendix VI.) |
| 3:45 - 4:00 | Break |
| 4:00 - 4:30 | Summarize session, include the management of needs assessment process, formation of a management team, formation of an advisory council, effective techniques for meetings, and development of a six-month time line. (See Appendixes VII, IX, X, XI, XII, XIII, AND XIV.) |
| 4:30 - 5:00 | Critique workshop and develop agenda for Day 2. |

## ABSTRACTS OF APPENDIX ITEMS

APPENDIX I - Overview: Sample speech used as overview for needs assessment workshop.

APPENDIX II - Idea Sharing: Procedure to gather data about guidance program operations.

APPENDIX III - Question Development Strategy: Procedure to generate questions about guidance.

APPENDIX IV - Survey Instrument Skills Development: Procedure to gain skill in development of effective survey questionnaire items.

APPENDIX V - Needs Assessment Report Preparation: Procedure to gain skill in development of final reports.

APPENDIX VI - Checklist to Critique Reports: List of elements to be included in reports.

APPENDIX VII - Time Line and Worksheets for Planning Process: Procedure to develop sample six-month time frame.

APPENDIX VIII - Sample Guidance Department Survey: Simulation to show how to report data about guidance department surveys.

APPENDIX IX - District Guidance Advisory Committee: Description of how to organize district guidance advisory committee. Indicates tasks, procedures, and potential problem areas.

APPENDIX X - Sample Advisory Committee Structure: Chart to indicate committee composition and relative position in school staff structure.

APPENDIX XI - Sample Role Statement: Sample rationale for organization of advisory committee.

APPENDIX XII - Sample Activities for Advisory Committee: Chart to indicate suggested events and activities for committee.

APPENDIX XIII - Establishing a Guidance Advisory Committee: Checklist of steps to establish committee.

APPENDIX XIV - General Suggestions for Conducting a Survey: Detailed checklist for conduct of survey.

APPENDIX XV - Sources of Additional Help: Loan packets of sample questionnaires.

APPENDIX XVI - Resources: Bibliography of concepts and ideas presented in document.

## APPENDIX I

### Overview

Guidance program development is a continuous process in all schools. It is built into the regular procedures for planning and budgeting. It reflects a wide range of management and operational philosophies. You are invited to join in a dialogue about an effective planning process that will be practical. Experience indicates that success in the *needs assessment*/program planning process is essential for continued growth in career guidance. Therefore, it is well to initiate the process on a manageable level, or portion of a program, rather than the entire program. The basic thrust makes career guidance a priority. We will test the needs assessment concept in relation to career guidance program development. We will seek a commitment to provide time for this. If there is to be progress for the things we anticipate, they cannot be done on top of and in addition to what we already do.

Can we get out our agendas? We have a few extras--Does everyone have a copy? Could we talk through what the remainder of the day will be like, just to get an idea of where we hope to go?

Think of yourselves as a management team that stays together as a team. There will be opportunities to share outputs, if you desire. The work you do can be as related to your actual situation as you wish to make it. Anything you don't want to be public knowledge should be kept within the confines of your own work group.

At 9:45, we will have a discussion of your situation that may enable you to generate areas of questions. This will be followed at 11:00 and 1:00 with skill sessions to place questions in a survey format. At 2:30, we will work on concepts to use the results of a survey in a report to help establish a framework for goals, objectives, priorities, and revised guidance program plans. At 4:00, we will discuss approaches to manage this process to include the idea of an advisory committee and a management team. At 4:30, we will discuss plans for a second workshop, if desired. By now, many of you must have reactions and questions. The floor is open to you.

· Addendum to Overview (to be mentioned in an answer):

Basically, the process has three parts. (1) *Initial planning* to get a segment of people involved and to design a structure for this involvement and commitment. (2) *Basic planning* to include an assessment within the context of pupil needs. This reviews the philosophy and scope of the present program, examines strengths and weaknesses, and builds upon strengths to develop new program plans. (3) *Conduct* the program and measure results to document effect and progress.

## APPENDIX II

### Idea Sharing

Task: To outline present status of guidance. In preparation, set up newsprint at each team station and have felt pens available.

A. Orient to Idea-Sharing Concept
   1. Discuss with pupils, counselors, parents, teachers, administrators, and others, current guidance practices. Summarize. Identify range of opinions and areas of agreement with respect to adequacies and needs.
   2. Establish an advisory committee of group representatives. Discuss present scope of guidance services and concerns, assist with program development, and determine desirability for more extensive needs assessment.
   3. Open guidance program to scrutiny, identify persons to assist with program development, and indicate need for further action.
   4. Spend half of time on each task. If task is completed, identify what is listed in that area as to importance.
   5. Record on newsprint. Team determines how this can be best accomplished. Use newsprint to: focus group attention, provide a memory bank of group discussion, provide a log of actions planned, substitute for a secretary, and provide record for participants.
   6. Refrain from philosophical discussions.
   7. List ideas presented. Accept any as that person's perception of situation. Clarify points that members do not understand. Don't get trapped in discussions of whether ideas are good or bad. Concentrate on each task separately.

B. List on newsprint, successful aspects of local guidance operations.

C. List on newsprint, guidance problems in current program.

D. Remind that information will be used for future sessions.

## APPENDIX III

### Question Development Strategy

Task: To test strategy to determine questions pupils, teachers, administrators, parents, employers, and other PPS staff have about guidance. Questions will be basis for item development section of workshop.

Givens:

- Development of a proactive career guidance program to improve educational, personal, and social performance of users of guidance is purpose of needs assessment.
- Guidance staff obtain direction to improve present and future performance through the clarification of present and desired status.
- Clarification begins with questions related to significant areas of user's life.
- Questions provide basis for use of current data and techniques for collection of new information.

A. Review strategy.(10 minutes)

B. List on newsprint no more than four specific incidents about guidance that were important and satisfactory. Include what happened, what you did. Also, list four incidents that concerned guidance that you saw happen to another person that were harmful or made their life worse. Include what happened and what you did. Rank lists in order of importance.(20 minutes)

C. As a group, review lists and then generate on newsprint, "What" type questions. (15 minutes)
Reference: Flanagan, John C. *Education's Contribution to the Quality of Life of a National Sample of 30 Year Olds,* Educational Researcher, June 1975.

## APPENDIX IV

## Survey Instruments Skills Development

A. Survey Instruments

Tasks: Each participant will become aware of:
- At least six characteristics of effective survey instruments (see p. 25)
- At least six characteristics of effective objective survey items (see p. 26)
- The use of additional resources in survey instrument development

1. Make presentations about survey instrument development and survey items. (15 minutes) (Use transparencies or handouts, pp. 25-32.)
2. Have each participant develop five objective survey items to demonstrate the six characteristics. Item content is based on areas of content or questions developed in last session. (15 minutes)
3. Have each team member meet with another team member, for five minutes, to share items. Each shows how item demonstrates the six characteristics for effective objective survey items. Other member of the group is responsible to seek clarification about characteristics. ***For the purpose of this exercise, no questions are raised as to appropriateness of the content of items.*** (10 minutes)

B. Interview and Survey Conduct

1. Representatives of non-professional school staff, teachers, parents, pupils, citizens, and administrators who volunteer, will interview five friends to ask two basic questions:
   - . What do you know about our school's guidance services?
   - . Do you have any constructive suggestions as to how these services might be more helpful?

   Representatives then meet in small groups to share answers. Each group makes a list and appoints a spokesman.
2. Lists are posted at general meeting, and each spokesman describes results to total group.
3. Total group prioritizes findings and summarizes three common priority concerns considered worthy for goal setting and program development.
4. Present these general comments:
   a. Do not ask every question available. It overtaxes interviewers and respondents and results in so much data that detail may obscure total picture.
   b. Strive for a 30-minute or less interview. To determine length, try questionnaire on one respondent at a time and cut questions until average interview takes no more than half an hour including demographic questions. (See explanation in h. below.)
   c. Word questions carefully and impartially.
   d. Be aware that "open" questions increase codification and tabulation time.
   e. Have interviewers use initial lines to identify themselves and purpose of questionnaire.
   f. Have questions flow in an order to insure that early questions or responses do not suggest later responses.
   g. Precode questions to aid in summary and report process.
   h. Ask for demographic data in the last questions. Population information statistics are better collected at the end, or may be omitted. For example, "Now, just a few questions about yourself so we can be sure we have contacted a cross section of people."
   i. Develop enthusiasm for survey.

j. Emphasize importance of being neutral in interview, otherwise people give answers they think you want.
k. Practice interview first. Pair off. Distribute one questionnaire to each pair. Have each person interview other.
l. Phrase all questions exactly as worded. To change words alters meaning of questions and result may be useless or misleading.
m. Use coded sheet to record responses.
n. Use clip board to make writing easier.
o. Have someone to answer questions as problems arise in practice exercise.
p. Discuss problems that emerge in the practice exercise and suggest ways to handle them.
q. Make certain all interviewers are familiar with questions, hand out cards, and procedures.
r. Make assignments. Have information on a handout that provides a schedule of when and where to interview, dates and hour, and when and where results are to be turned in.
s. Have a team leader for every ten interviews with responsibility to put together, pick up, and deliver materials.
t. Assign no more than five or six interviews to one person in any one day.
u. Use group procedures to obtain information. Since group skills are different than those used in individual interviews, leadership training and the use of newsprint to record will be required.

TRANSPARENCIES
OR
HANDOUTS

## SIX CHARACTERISTICS OF EFFECTIVE SURVEY INSTRUMENTS

1. The Survey Should Be As Brief As Possible, But Should Include Enough Questions To Gather All Necessary Information.
2. The Survey Should Have A Format Which Is Neat, Attractive, And Clearly Printed.
3. The Survey Should Show Smooth And Logical Relationships Between Items And Within Topic Areas. Items Should Be Grouped By Major Subcategories. Items Should Be Arranged To Proceed From General To Specific Responses.
4. The Survey Should Require Sufficient Identification Information So That Those Who Respond Can Be Placed In Predetermined Groups For Analysis.
5. Directions Should Be Clear And Complete.
6. Model Summary Tables Should Be Developed To See If Item Responses Can Be Easily Organized For Interpretation.

## SIX CHARACTERISTICS OF EFFECTIVE OBJECTIVE SURVEY ITEMS

1. Items Should Seek Information Which Cannot Be Readily Obtained From Other Sources.
2. Items Should Be Clearly Stated, Unbiased, And Create No Embarrassment Or Annoyance To Persons Who Respond.
3. Items Should Use Language Which Is In Common Usage By The General Population.
4. Items Should Reflect A Neutral Position As To The "Correct" Response.
5. Items Should Deal With One Concern Per Item; One Subject, One Action, And One Object Of The Action.
6. Response Choices Should Be Clear And Understandable With Commonly Agreed Upon Meanings.

Definitions

Objective Item: A Question Or Statement Which Controls The Complete Range Of Responses Desired.

Open-Ended Item: An Item Which Does Not Control The Range Of Expected Responses. An Item Which Can Result In Unexpected Responses.

1. Items Should Seek Information Which Cannot Be Readily Obtained From Other Sources.

Examples:

Pupils In This School Are Assigned To Counselors On An Alphabetical Basis.

Yes No

Pupils Appear Satisfied With Their Counselor Assignment.

Yes No

2. Items Should Be Clearly Stated, Unbiased, And Create No Embarrassment Or Annoyance To Persons Who Respond.

Examples:

Taking Into Account Their Obvious Lack Of Intelligence And Occasional Instances Of Trying To Usurp Administrative Prerogative, How Often Should Administrative Memos Be Sent To Guidance Counselors?

A) NOT AT ALL

B) ONLY ON TUESDAYS

C) WHEN THE SPIRIT MOVES

D) WHY SHOULDN'T THEY?

How Often Should Administrative Memos Be Sent To Guidance Counselors?

A) NOT AT ALL

B) ONLY WHEN NEEDED TO FUNCTION

C) ALL THE TIME

3. Items Should Use Language Which Is In Common Usage By The General Population.

Examples:

Would You Like Your Progeny To Take Such Quantitative Investigative Instrumentation as the ACT - ACD?

Yes No

Would You Like Your Child To Take A Test To Learn About His Or Her Ability To Make Career Choices?

Yes No

4. ITEMS SHOULD REFLECT A NEUTRAL POSITION AS TO THE "CORRECT" RESPONSE.

EXAMPLES:

SHOULD COUNSELORS BE EXPECTED TO BE INVOLVED IN AFTER SCHOOL ACTIVITIES?

A) NOT AT ALL

B) ONLY AS A SUBSTITUTE TO COVER FOR SOMEONE WHO IS ABSENT

C) ONLY WHEN THE ACTIVITY HAS A LOGICAL RELATIONSHIP TO THE GUIDANCE PROGRAM OBJECTIVES

D) COUNSELORS SHOULD MEET THE SAME EXPECTANCIES AS TEACHERS

COUNSELORS SHOULD BE INVOLVED IN AFTER-SCHOOL ACTIVITIES.

A) NOT AT ALL

B) WHEN BASED ON PERSONAL INTEREST

C) THE SAME AS TEACHERS

D) IF IT DOESN'T INTERFERE WITH PROGRAM ACTIVITIES

5. Items Should Deal With One Concern Per Item; One Subject, One Action, And One Object Of Action.

Examples:

Counselors Seem To Spend The Majority Of Their Time With A Minority Of Pupils Who Create Problems For The School Both Academically And Behaviorally, And With Little Visible Effect.

A) AGREE B) DISAGREE

Counselors Seem To Spend The Majority Of Their Time:

1. WITH A MINORITY OF PUPILS A) AGREE B) DISAGREE
2. WITH PUPILS WHO CREATE PROBLEMS FOR THE SCHOOL BOTH ACADEMICALLY AND BEHAVIORALLY A) AGREE B) DISAGREE
3. WITH A MINORITY OF PUPILS AND HAVE LITTLE VISIBLE EFFECT A) AGREE B) DISAGREE

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6. Response Choices Should Be Clear And Understandable With Commonly Agreed-Upon Meanings.

Examples:

How Much Time Do Guidance Counselors Spend To Help Pupils Conform To The School's Requirements?

A) JUST A SMIDGE

B) MORE THAN A SMIDGE

C) A LOT MORE THAN A SMIDGE

D) EVEN MORE THAN A LOT MORE THAN A SMIDGE

How Much Time Do Guidance Counselors Spend To Help Pupils Conform To The School's Requirements?

A) NOT AT ALL

B) ONCE PER WEEK

C) ONCE PER DAY

D) ALL THE TIME

## APPENDIX V

### Needs Assessment Report Preparation

Task: Use information presented to prepare needs assessment reports. Reports should include one or two sentences for each section.

A. Distribute materials.

B. Discuss Checklist to Critique Reports, to emphasize various items to include in exercise.

C. Work on task.

## APPENDIX VI

### Checklist to Critique Reports

Use the criteria listed to write or assess the quality of needs assessment reports.

*PURPOSE - Purpose of report*
*AUDIENCE - Audience for whom report is intended*
*RATIONALE - Reason for needs assessment*
*PLANNING CONTEXT - Overview of planning process with time frame*
*EXPECTATIONS AND LIMITATIONS - Advantages and disadvantages of this needs assessment*
*ROLES AND RESPONSIBILITIES - Individual's roles and responsibilities for administration, management, and implementation of needs assessment*
*SCOPE AND FOCUS - Characteristics of population assessed with specific situations and domains*
*SAMPLING - Approach used to select samples*
*PROCEDURES - Data gathering procedures and information about and examples of instruments used*
*DATA COMPILATION AND ANALYSIS - Procedures used to organize, tabulate, analyze, and interpret data with summary of results*
*PRIORITIES - Criteria, procedures, and personnel used to prioritize needs*
*TRANSITION - Next steps to be taken to translate pupil needs assessment data into guidance practices and activities*

## APPENDIX VII

### Time Line and Worksheets for Planning Process

Task: Develop time line for needs assessment.

WORKSHEET

You are a member of a teacher-counselor study group that has looked closely at the junior high school guidance program. Assume that this school exists in your community. You understand your community and school structure. As a result of deliberations, the group feels that parents are not fully aware of the guidance program. They would like to ascertain parents' knowledge, interest, and needs in regard to the career planning of their children. They feel some type of parental needs assessment is desirable.

The group has previously discussed a guidance advisory committee. They agree a committee should be established and could assist to assess parent needs. The guidance chairman who has served as leader of the group will be asked to present a plan of action to the school administrator. The plan will include the formation and organization of an advisory committee, the development of a needs assessment instrument, the completion of a survey, and the completion of a final report. The group now has to devise this plan.

| Month | Major Activity | Personnel Involved | Time Commitment | Responsible Person | Special Problems |
|---|---|---|---|---|---|
| | | | | | |

SIX-MONTH TIME LINE

| | |
|---|---|
| September | Approval and Commitment |
| | Agreement from the guidance staff, the administrative staff, and the present advisory committee (if one exists) that scrutiny of the program is needed (or any segment of the program). Presentation of action plan to Chief School Officer, the guidance chairman, or pupil service coordinator to include:<br>1. Area to be investigated.<br>2. Why need exists.<br>3. Scope of investigation, personnel to be involved, additional resources, and time needed.<br>4. Presentation of name of person to manage progress.<br>5. Time needed to complete needs assessment.<br>6. Method to report back.<br>7. Action tentatively planned after report.<br>8. Commitment to total process. |
| October | Committee Organization |
| | Advisory or management team appointment - chairman appointment. Chairman clarifies role with Chief School Officer. Advisory committee initiates discussions of their role and agrees upon function, responsibility, length of existence, and report procedure. |
| November | Initiate Target Area Discussion |
| | Discussion of goals and specific objectives. Do they exist? Must they be generated? Are they to be created prior to the survey? |
| December | Devise Specific Survey Form |
| | Develop survey form for specific populations. |
| January | Conduct the Survey |
| | Conduct survey, tabulate results and report on progress. (See Appendix VIII) |
| February | Prepare and Present Final Report |
| | Analyze results of survey. Prepare written report for Chief School Officer and the Board of Education. Present recommendations for next steps. |

WORKSHEET FOR A PLANNING PROCESS

PRIORITY: _____

OBJECTIVE _____ : (A specific, measurable objective expressed in pupil behavior)

BASELINE DATA: (A statement of the degree, percentage, or other unit of measure of change anticipated by the end of one year)

| ACTIVITIES - STRATEGY | SPECIFIC PROCEDURES TASK/PROGRAM | RESPONSIBILITY | RESOURCE PERSONNEL | TIMETABLE | BUDGET |
|---|---|---|---|---|---|
| (List each major activity which is planned to meet the stated objective to the extent specified in the criteria for evaluation above.) | (The "how" each activity will be carried out.) | (Who will supervise, manage the program.) | (List those in-schoo! and out-side the school people who can and will make a specific contri-bution to an activity listed.) | (The"when" and esti-mated number of days needed to com-plete the activity.) | (Est'd cost of special mate-rial, equip., travel, etc.) |

## APPENDIX VIII

### Sample Guidance Department Survey

To inform the guidance advisory committee of the scope of existing services, the guidance staff has prepared an analysis of activities and responsibilities. The analysis consists of a list of counselor activities, time analysis chart, and a responsibility chart. The time chart lists 13 basic areas of counselor activity, the percentage of time devoted to each area (total = 100%) and ranks activities by counselor preference. Staff indicated how time was spent and how they would like to spend it. The list of activities was used to develop the responsibility chart. In it, counselors indicated (1) if they performed the activity, (2) how essential they felt the activity was, and (3) who they thought should be responsible to carry out the activity. School administrators were also asked to respond to the instruments. In addition to the program analysis, counselors were interviewed by a representative of the Bureau of Guidance These questions are indicated in Table I.

The results illustrated areas of agreement and disagreement between counselors and administrators.

Time analysis data appears in Chart No. 1. Percentages of time spent in activity areas by counselors were ranked and compared for activity preferences. This analysis allowed determination of areas where counselors wished to spend more time, and areas where they felt less time was needed.

Chart 1

Counselor Time Analysis

| Activity Area | Average of Time Spent | Present Rank | Activity Preference Rank |
|---|---|---|---|
| Orientation | 3.1 | 9 | 6 |
| Testing Involvement | 9.6 | 3 | 5 |
| Individual Counseling | 40.9 | 1 | 1 |
| Group Guidance | 6.3 | 5 | 2 |
| Educational and Career Information | 7.6 | 4 | 4 |
| Administrative | 9.9 | 2 | 8 |
| Staff Inservice/ Consultation | 4.8 | 6 | 7 |
| Parent Conferences | 4.7 | 7 | 3 |
| Coordination of Referrals | 2.8 | 10 | 9 |
| Placement | 2.2 | 12 | 10 |
| Record Keeping | 3.7 | 8 | 13 |
| Research | 2.0 | 13 | 11 |
| Other Duties | 2.4 | 11 | 12 |

Chart 2 indicates that staff agree on individual counseling as the most essential of all activities. Most of the high ranked activities on essentialness show a high counselor concern with direct pupil contact. The conduct of parent conferences was ranked 8.5 on essentialness out of 46 ranked activities. Perhaps consideration should be given for more time for this activity. The highly ranked activities on guidance essentialness involve contact with pupils, parents, and teachers and have direct bearing upon pupil behavior. The medium ranked activities are supportive in nature, and involve less direct contact with people. The lower ranked activities are clerical or administrative in nature and removed from a helping relationship with pupils.

Chart 3 lists activities and the percentage of agreement among counselors about primary responsibility. For example, all believed that to provide financial aid information is a counselor responsibility. Counselors agree upon responsibility for activities which involve "helping" contacts with pupils. Activities associated with lower percentages are either routine administrative tasks or those not traditionally assigned.

Chart 2

Essentialness of Counselor Activities

Scale: 6 5 4 3 2 1 (Very Essential — Not Essential)

| Rank | Activity | Average Score |
|---|---|---|
| 1 | individual counseling | 6.0 |
| 2 | interpret test results to pupils | 5.9 |
| 3 | college planning conference | 5.8 |
| 4 | registration of pupils | 5.7 |
| 5 | career exploration | 5.6 |
| 45 | class or club advisor | 2.0 |
| 46 | supervise study hall | 1.9 |

Chart 3

Responsibilities for Guidance Program Activities
As Viewed by Guidance Staff

| Counselor Responsibilities | Percentage Agreement |
|---|---|
| provide financial aid information | 100 |
| individual counseling | 100 |
| job survey of the community | 20 |
| serve on curriculum committee | 20 |
| **Administrator Responsibilities** | |
| classroom visits | 100 |
| tracking of pupils | 20 |
| **Teacher Responsibilities** | |
| arrange field trips | 100 |
| deficiency reports | 20 |
| **Secretarial Responsibilities** | |
| send transcripts | 80 |
| construct honor role | 20 |

Table I

| | |
|---|---|
| Q. 1. | What are your needs as a counselor? |
| Q. 2. | What are the needs of your pupils? |
| Q. 3. | What are the needs of your school? |
| Q. 4. | What would you like to do more of as the guidance staff of this school? |
| Q. 5. | What would you like to try? |
| Q. 6. | What would you like to do less of as counselors? |

## APPENDIX IX

### District Guidance Advisory Committee And Needs Assessment Committee

A district guidance advisory committee is a representative group of administrators, pupil personnel specialists, parents, pupils, and community leaders who meet periodically. They provide an overview for integration of guidance program goals, objectives, programs, activities, and evaluation. They serve as a forum for discussion about changing social conditions and their effects upon pupils. The committee's functions are advisory and serve as a link between administrators, guidance staff, teachers, pupils, parents, and community representatives.

The advisory committee may also help establish a working committee to carry out a needs assessment. This group, since it has specific functions which are different from the advisory committee, may or may not encompass the same membership.

The involvement of persons to study needs, assess strengths and barriers, and establish priorities requires staff time. Unless this time is secured, a comprehensive program cannot be implemented.

To organize the working or needs assessment committee, small group discussions are held with administrators, faculty representatives, pupils, parents, other specialists, and guidance staff. As these discussions identify concerns about needs of pupils, they also encourage persons to extend their interests to do something about the concerns. A cross section of persons is needed for the working committee. Action-oriented, positive persons should be sought. Volunteers generally result in a group of willing workers. People with prior experience make the chairperson's task easier.

A meeting is held for potential working committee representatives to report their informal interviews. Results are summarized and posted as they are presented. The chairman emphasizes that there are many perceptions of guidance in the school and community through group discussion to expand on identified concerns. A second meeting develops ideas which express common views of concerns previously identified. Usually, overlap exists. The group seeks convergence to put together and unify two or more concerns, then as a whole, ranks, selects, and recommends priority areas. In the selection of priority areas, they consider how common is the concern, is there apt to be support for the idea, and does it have a sense of urgency.

At this point, the working committee is ready to validate its perceptions of need. The questions and concerns generated provide the basis for development of questions, interview guides, and related procedures. In its search for agreements, the working committee covers broad, long-term goals that everyone agrees upon but feels no need to act on them immediately. As discussion continues, it gradually centers on realistic concerns which can be focused in questions.

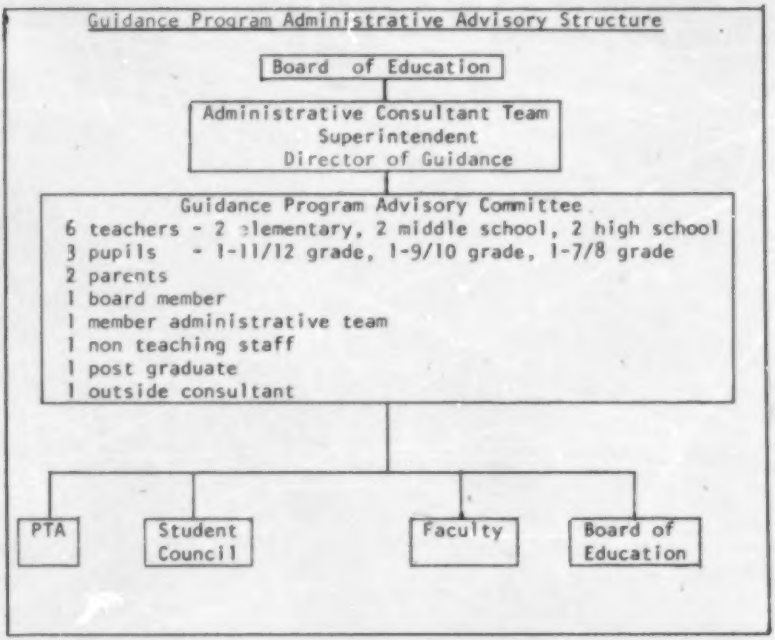
A key concept is to build on strengths, rather than to seek to correct weaknesses. Efforts should be directed toward strengths, desires, and untapped capacities of people, rather than problems, misconceptions, and resistance. Assessments should avoid the identification of problems and the development of new programs to cope with them. Problems are endless, and solutions only expose other problems. Problem hunting is a strategy to avoid action. When there is no clear idea of the job to be done, to solve problems often becomes a goal in itself.

When both committees accept responsibilities, all involved must clearly understand the tasks. Difficulties arise when people have different ideas of what they are to do. Time devoted to talk through the plan is well spent. Agreements are written with assignments and time deadlines. All know what others are to do and how responsibilities relate. A volunteer for an assignment understands what is to be done and the resources and time available.

Consultant assistance may be used. This helps the advisory committee with its management techniques and the working committee in the conduct of the assessment. Additional planning groups may be considered at the point of goal setting. Such groups design activities to achieve goals and the evaluation of outcomes.

## APPENDIX X

### Sample Advisory Committee Structure



## APPENDIX XI

### Sample Role Statement

**Role of the Guidance Program Advisory Committee**

The Advisory Committee for Guidance is appointed by the Board of Education. The Committee Membership includes representation from all areas of the school system. The group is organized to provide for realistic, representational participation by parents, pupils, and teachers to review the school's guidance program and plan improvements.

Purposes: The Committee will act as a sounding board for new ideas and projects that are developed. They will listen to what people say about the school's guidance program. They will have the opportunity and responsibility for proposing new ideas, projects, or changes in the program's method of operation. They will make recommendations to the guidance department and will express their reactions to proposals for changes in methods of operation. The members will promote understanding of the guidance program in the school and community. They will help strengthen understanding between the community and the school in regard to guidance concerns and issues.

The Advisory Committee will meet at least once every two months on a regular basis. In addition, special meetings of the Committee may be necessary.

For the Committee to remain representative on an ongoing basis, membership will be for a specified time, with 50% changed each year.

## APPENDIX XII

### Sample Activities for Combined Advisory and Needs Assessment Committee

Events and Activities for First Six Months

| Events | Activities |
|---|---|
| start process to select Advisory Committee | . invite nomination committee to meet<br>. hold meeting and make selection |
| end process - select Committee | . gain approval from nominees and Board of Education |
| start process to meet with Advisory Committee to determine direction for its role, activities | . hold first meeting, review proposed role, outline and get agreement on organizational details, determine next steps |
| start process to obtain views of school guidance services | . survey pupils, teachers, administration, and others |
| end process - written report | . prepare report |
| start process to obtain community view of guidance services | . survey parents and employers |
| end process - written report | . prepare report |
| start process to build unity in administrative-consultant team<br>end process - agreement | . meet with team, review reports, and reach agreement on basic assumptions and common areas of thinking |
| start process to plan for workshop on guidance philosophy | . meet with administrative consultant team to discuss workshop<br>. assess needs of persons to attend workshop<br>. develop plan for workshop and locate personnal |
| end process - hold workshop | . hold workshop |

| | |
|---|---|
| end process - Advisory Committee develops final statement of guidance program philosophy | . submit report of school view to advisory committee<br>. submit report of community view to advisory committee<br>. use committee to complete philosophy statement |
| end process - print philosophy statement and develop long- and short-range plans with advisory committee | . plan two-day planning session for guidance staff<br>. hold meeting to develop goals, objectives, and strategies for the next school year<br>. summarize plan for presentation to administration consultant team<br>. revise plan for presentation as part of annual report to Board of Education |
| end process - approved plan for coming year | |

## APPENDIX XIII

### Establishing a Guidance Advisory Committee

1. Board of Education approves area in which guidance advisory committee will operate (i.e., feedback from community, and specific tasks such as to develop goals and objectives or conduct a needs assessment).
2. Board of Education endorses concept that committee can be helpful and constructive.
3. Board of Education defines limits of activities of committee. Commitment of resources, personnel and time of school staff is specified.
4. All involved explore basic understandings. Committee *must* be advisory, not policy making. Committee *must not* be viewed as pressure group. Board of Education is under no obligation to accept findings of group.

5. Committee is selected by Board of Education or Chief School Officer or is volunteer group. It represents geographic, economic, religious, social, ethnic, and racial sections of community. Members who volunteer or who are appointed obtain board approval.
6. School staff and pupils are represented on committee.
7. Member of Board of Education becomes part of committee.
8. Chairman of group is appointed by Chief School Officer and given instructions as to group's task, responsibilities to organize, and to whom to report.
9. Chairman assembles committee to orient them to their role, to define their task, and to discuss perceptions.
10. Committee discusses and reaches agreement about time constraints, resources, and personnel available, and to whom and how often they report. Continuous feedback to administrative staff and Board of Education is arranged.

## APPENDIX XIV

### General Suggestions for Conducting a Survey

A. Planning

1. Obtain approval from proper authorities (i.e., superintendent, chief school officer).
2. Solicit support from influential sponsors.
3. Specify precise definitions of population to be sampled.
4. Determine relevancy of designated population.
5. Specify objectives of survey and gather only data which contributes to meeting objectives.
6. Develop survey management plan as instrument is being developed, to include plans for data analysis and display.
7. Inform of survey prior to release of questionnaire (articles in newspapers, spot radio announcements or preliminary mailings).
8. Develop sampling design to insure presentation of various populations.
9. Develop cost estimate.

B. Instrument Development

1. Make questionnaire as brief as possible.
2. Develop format which is neat, attractive, and clearly printed.
3. Consider booklet format.
4. Prepare questionnaire with smooth, logical inter-question and intra-topic movement. Group questions by major category. Arrange questions to proceed from general to specific.

5. Arrange questions to be machine scored.
6. Arrange layout to facilitate rapid editing and programming.
7. Include identifying information so replies can be grouped for analysis.
8. Prepare directions which are clear and complete.
9. Use specific operational definitions.
10. Use glossary for difficult terms and vocabulary.
11. Develop summary tables to see if questionnaire will lend itself to table organization.

C. Item Development

1. Be sure questions do not require respondent to survey another source for information.
2. Use limited number of open questions to gather information which cannot be gained in objective questions, and place at end of survey.
3. Make sure items are grammatically consistent and comparable in length.
4. Include all possible answers.
5. Be certain vocabulary used is understandable.
6. Allay suspicion of individuals in the use of responses.
7. Be aware that certain items encourage inaccurate responses.
8. Consider the classification of responses yourself, rather than having respondent select category.
9. Recognize that words have limitations and can be misunderstood.
10. Make purpose of questionnaire significant to respondent.
11. Use individual file cards to develop each item to be used in final draft.
12. Make questionnaire anonymous.
13. Make questionnaire interesting, particularly the first item.
14. Provide for systematic quantification of responses.
15. Allow adequate space to respond.
16. Ask questions to which respondents will have adequate information.
17. Be selective when underlining certain words, particularly negatives.
18. Be sure choice of answers cover all possibilities, including "other" or "no response."
19. Avoid requests for information readily obtained for other sources.

20. Avoid questions which are ambiguous, emotionally loaded, embarrassing, or annoying.
21. Avoid use of jargon.
22. Eliminate questions considered irrelevant.
23. Avoid suggesting responses or leading questions.
24. Avoid using unnecessary phrases such as "in your opinion" or "what do you think."
25. Avoid the use of abbreviations and acronyms.
26. Avoid the use of double-meaning questions.
27. Avoid the use of questions with inadequate alternatives.
28. Avoid the use of vague modifiers with no agreed-upon meaning (e.g., frequently, rarely, occasionally).
29. Avoid personalizing questions.
30. Avoid questions which lead to unwarranted assumptions.
31. Avoid slang terms or phrases.
32. Avoid threatening questions.
33. Avoid personal information not required for final analysis.

D. Survey Management

1. Circulate questionnaire to small group of professionals for reactions.
2. Conduct field test with group similar to sample.
3. Provide stamped, return address envelope. Use attractive commemorative stamp.
4. Include courteous cover letter which explains purpose.
5. Send two copies of questionnaire so respondent can keep one.
6. Offer to send summary of results.
7. Send follow-up post card two weeks after initial mailing to nonrespondents. Follow with letter and additional copy of questionnaire four weeks after initial mailing.
8. Arrange procedure to tally responses as questionnaires are received.

## APPENDIX XV

### Sources of Additional Help

The Bureau of Guidance has a variety of survey instruments prepared by other states and commercial organizations. Loan packets of these are available. Consultant assistance is also available from the Bureau of Guidance concerning the design, administration, and use of results from local needs assessment surveys.

The following are examples of questionnaires available:

- Survey of Opinions on Career Guidance
- Parent Survey
- Student Survey
- Teacher Inventory of Guidance
- Student Evaluation of Guidance
- Parent Questionnaire
- Career Development Survey Questionnaire
- Priority Counseling Survey (cover page only)
- Assessment of Career Development, Student Test Booklet (cover page only)
- South Dakota Needs Assessment Instrument
- Code Sheet for South Dakota Instrument
- North Dakota Student Guidance Survey
- North Dakota Administrators Guidance Survey
- North Dakota Teachers Guidance Survey
- North Dakota Parent Guidance Survey
- North Dakota Scales
- Texas Student Inventory of Guidance Awareness
- Texas Teacher Inventory of Guidance Awareness
- Texas Counselor Questionnaire
- Texas Checklist for the Director of Guidance Services
- Texas Checklist for the School Principal
- Ohio Student Survey
- Ohio Evaluation Criteria for a Secondary School Guidance Program
- Pennsylvania Followup of Former Students Survey Form
- Pennsylvania Parent Survey Form
- Pennsylvania Secondary Student Guidance Awareness Survey Form
- Pennsylvania Elementary Student Guidance Awareness Survey Form

- Pennsylvania Junior High School Followup Survey Form
- Pennsylvania Elementary School Followup Survey Form
- Pennsylvania Teacher Evaluation of the Counseling Services Survey Form
- Missouri Student Needs Survey, Parts I, II, III, and IV
- Missouri Student Questionnaire, Part V
- Missouri Student Needs Survey Student Section Answer Sheet
- Missouri Student Needs Survey Teacher Section
- Missouri Student Needs Survey Employers Section
- Missouri Student Needs Survey Parents Section
- Columbia University Life Competencies Inventory
- Columbia University General Guidance Activities Inventory
- Columbia University School Opinionnaire
- Developmental Counseling Project Pupil Survey Questionnaire
- Developmental Counseling Project Parent Survey Questionnaire
- Developmental Counseling Project Teacher Survey Questionnaire
- Developmental Counseling Project Counselor Survey Questionnaire

## APPENDIX XVI

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No. 2 - Evaluating Pupil Personnel Programs, 1971, 97 pages;
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No. 4 - A Master Plan for Pupil Services, 1972, 160 pages;
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